

Information Technology Procurement

House Select Committee on
E-Procurement
October 26, 2011

G.S. 147-33.72F

- The Office of Information Technology Services shall establish procedures for the procurement of information technology. The procedures may include aggregation of hardware purchases, the use of formal bid procedures, restrictions on supplemental staffing, enterprise software licensing, hosting, and multiyear maintenance agreements.

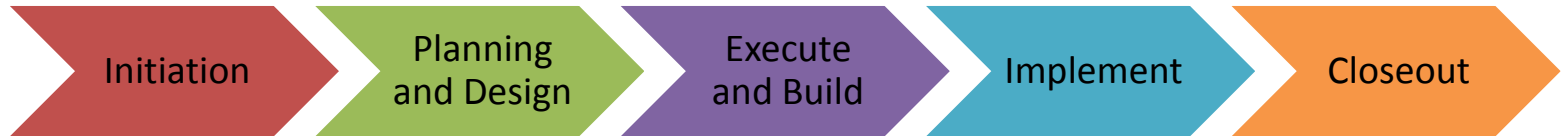
Information Technology Procurement

- North Carolina Administrative Code, Title 9, Chapter 6
 - Term Contract, Open Market, Waiver of Competition
 - \$25,000 Delegation
 - Bid Thresholds
 - <\$5,000
 - \$5,000 - \$10,000
 - \$10,000 - \$25,000
 - >\$25,000

G.S. 147-33.72C

- The State Chief Information Officer shall review all State agency information technology projects that cost or are expected to cost more than five hundred thousand dollars (\$500,000), whether the project is undertaken in a single phase or component or in multiple phases or components.

State Project Approval Process



Project workflow provides checkpoints to allow state approvers to review projects and determine any risks. Smaller projects (\$100,000-\$500,000) only require review at the first checkpoint. Large projects also require monthly status reporting.

Project Approvers are: Agency CIOs, Agency Chief Financial Officers, Enterprise Project Management Office, Office of State Controller, Office of State Budget and Management, Strategy and Architecture/State CIO's Office, Deputy State CIO and State CIO

IT Procurement and IT Projects

- Gate 1 Project Registration/Approval
 - During the Project Planning Phase, the Agency determines any requirements for procuring goods and services necessary for implementation of the project. Once these needs are identified, the appropriate procurement methods should be utilized.

IT Procurement and IT Projects

- Procurement
 - The Procurement Process includes all work activities associated with purchasing goods and services, developing RFX's, soliciting and evaluating proposals, negotiations, vendor selection, contract award, and vendor/contract management. During the procurement process, the EPMO, Statewide IT Procurement Office, Enterprise Architecture and a representative from the Attorney General's Office assigned to ITS are required to conduct reviews and approve agency solicitations, vendor responses and award recommendation.

IT Procurement and IT Projects

- The Statewide IT Procurement Office will not approve a solicitation associated with a project that has not received Gate 1 approval.

IT Procurement and IT Projects

- What is an IT Project?
- What is the “Typical” Agency PM Role?
- What does the PMA Review?
- What does Enterprise Architecture Review?
- What does IT Procurement Review?
- What does Legal Review?
- What is the “Typical” Role of Agency?

IT Procurement and IT Projects

- RFP Template
 - Technical Specifications
 - Enterprise Architecture Standards
 - Enterprise Licensing
 - Hosting
 - Virtualization
 - NCID
 - Work Statement
 - Technical Requirements/Specifications
 - Cost Proposal
 - Other Requirements and Special Terms

IT Procurement and IT Projects

- Initiate Project
- Plan and Gather Requirements
- Prepare the RFP
- Prepare Vendor Proposal Evaluation Plan
- Receive and Answer Vendor Questions
- Receive and Evaluate Vendor Proposals
- Select Final Vendor and Award Contract

Information Technology Procurement

<http://www.epmo.scio.nc.gov/>

<http://www.its.state.nc.us/ITProcurement/>

<https://www.scio.nc.gov/services/enterpriseArchitecture.aspx>

Questions